GLENGORMLEY

TOWN CENTRE HEALTH CHECK

APRIL 2010

TRIBAL

Executive Summary

Introduction

Each of the Planning Policy Statement 5: Retailing and Town Centres indicators outlined in this Town Centre Health check can be brought together to present an overall picture of the vitality and viability of Glengormley Town Centre. This in turn can then inform a 'SWOT Analysis', considering the relative strengths and weaknesses of the Town Centre, the opportunities to improve the overall vitality and viability of the centre and the factors that could threaten the success of improvements.

Accessibility

Although there is no data available on traffic flows through Glengormley town centre, anecdotal evidence suggests congestion occurs on most of the approaching roads. The town centre is dominated by the four-lane Antrim Road running through the centre, with parking restrictions in place to enable free-flowing traffic. This makes pedestrian movement difficult.

There is one free off-street public car park in Glengormley, as well as a number of additional off-street spaces associated with particular land uses, such as the cinema and restaurants. Some perpendicular parking is provided in front of a number of new units to the north of the centre, but there is evidence of informal forecourt parking, often on the footpath, in other parts of the centre. Again, this creates an unpleasant walking environment for pedestrians.

Both the A6 and the A8 are important for bus services, meaning Glengormley is well served by a frequent bus service to the centre of Belfast. However, public transport links to the Abbey Centre and Valley Leisure Centre are poor. There is only one pair of bus stops serving the centre of Glengormley, meaning visitors are unable to arrive at one end of the cente and depart at the other. In addition, there are no bus priority measures in place, meaning journey schedules are disrupted and reliability is reduced.

Walking is often difficult, unpleasant and even unsafe within Glengormley. There is an absence of pedestrian crossing facilities in the core part of the centre, which exacerbates the lack of cohesion and severance experienced in the centre. This results in low levels of pedestrian activities. Pavement widths within the town centre are variable and the provision of dropped kerbs in not comprehensive. This make movement with wheelchairs and buggies difficult. There is no provision for cycling.

Land Use Profile

There are 150 units within Glengormley Town Centre, as well as 5 residential units. The breakdown of land use within the town centre shows a number of concerning variations when compared to the UK average.

Convenience outlets are under-represented, comprising only 5.33% of all units. They are evenly distributed and include a number of small independent butchers and bakers. The proportion of comparison outlets is also well below the national average, suggesting a limited viability of the town as a traditional retail centre. These weaknesses are most likely a reflection of strong convenience and comparison retail competition provided by the Abbey Centre and the Northcott Shopping Centre.

As a result of the decline in traditional retailing, Glengormley has developed a niche role in the service sector. With over half of the units being classified as service sector, the proportion is 18% above the national average. The town centre also has a number of small, independent offices. Again, the distribution of these units throughout the centre is relatively even. Despite this strength, the high proportion of leisure services does lead to a lack of vitality during the day.

With 19 out of the 150 units within Glengormley being vacant, the proportion is above the national average. This is likely to be an indicator of poor vitality and viability, particularly given the number of vacancies fronting onto the Antrim Road in the traditional retail core. The low proportion of residential units also detracts from the overall vitality of the area, although the centre is surrounded in all directions by residential suburbs.

Footfall

The entrance to the Tramway Centre is the busiest location within Glengormley town centre. This is most likely attributed to the Tramway Medical Centre and Iceland located within the Shopping Centre, but may also reflect access to the public car park and bus stops.

Within the traditional retail core, the pedestrian flows remained relatively high, despite the high levels of vacancy and dereliction in this area. This may reflect the attraction of the Glen Inn at the heart of the town, or may be the result of movement of shoppers from the car park or via bus near the Tramway Centre to visit services in the northern part of the town. Either way, a high footfall in this area can be considered a strength for the traditional retail core.

Elsewhere within the town centre, footfall tails-off. However, whilst it is common in even the best performing town centres to find a dramatic tail-off in footfall in peripheral areas, in Glengormley the tail-off seems lower and more evenly spread. This reflects the compact nature of the town centre.

It is notable that many of the peripheral areas of the town centre are the highest performing on a Saturday, suggesting that the town centre is well used by local residents on a Saturday. This, and the size of the catchment population within a short walk of the town centre, is a real strength.

Market Indicators

The town of Glengormley is situated in a densely populated hinterland and is in close proximity to Belfast City Centre, Antrim, Templepatrick, Ballyclare and Carrickfergus. The town centre is busy, particularly with car borne traffic emphasising Glengormley's strategic location close to Sandyknowes roundabout and at the "fiveways" intersection (linking Belfast, Antrim and Glengormley) of a number of Newtownabbey's more major arterial routes.

Glengormley benefits from excellent road links to Belfast City Centre both via the Antrim Road and the M2. It has, as such, asserted its position as one of Belfast's most popular and fastest growing commuter locations, further enhanced by the topography of the area, which from many areas offers excellent views overlooking Belfast Lough.

There is however a price to pay for the towns strategic location and popularity. Considerable traffic congestion issues have beset the town for a number of years as the town has undergone the transformation from peripheral village to densely populated suburb. The infrastructure seems to be no longer capable of satisfactorily servicing the now considerable demands now placed upon it, both as the population has increased and as they have become overwhelmingly "car borne".

From a retail perspective, this situation combined with more structural changes in the retail landscape in recent years has not been to the benefit of the local independent sector. The former village of Glengormley, once at the centre of a smaller community in which butchers, bakeries, furniture shops, fashion shops and Newsagents combined to generate a distinct sense of place finds itself now lacking in identity as these occupiers have disappeared, not least due to the emergence of Tesco et al and the ever-increasing accessibility of nearby competing retail centres such as the Abbey Centre and Belfast City Centre.

The former "Village Square" at the junctions of the Carnmoney Road and the Antrim Road at one time provided a focal point and "sense of arrival" for Glengormley Village Centre. This sense of identity has been lost to a combination of suburban sprawl, car domination and road widening schemes. As a result, the town lacks an identifiable centre.

The accessibility and quantity of public car parking within the town centre is considered to be poor and a key constraint to unlocking any latent potential that the town may have.

To emphasise the positive however, the town's densely populated surroundings is a significant asset. With a more amenable town centre in which parking is more accessible and the pedestrian shopper is able to circulate more easily, it is possible to envisage that a limited number of new retailers could be attracted to the town.

In terms of the extant stock of commercial property, currently the character of the town centre is being compromised by aging buildings and too many poor quality retail fascias. Over the course of the Masterplan timeframe we envisage that buildings will be redeveloped and refurbished to provide better quality units, which is central to the demands of modern retailers and leisure operators. We believe that there is also scope for additional development in the town centre.

There is already a considerable Leisure offer in the town and this should be seen as a key strength. The evening economy is vibrant with a good offering of restaurants and to a lesser extent bars. However, this also could be improved. Again, a lack of parking is seen as a primary constraint to the future growth of this sector.

There is residential housing on the fringes of the town centre. There is scope to create new town centre residential accommodation during the course of the Masterplan. This is most likely to be in the form of new apartment developments. This however must not be to the further detriment of the parking problem. Adequate parking supporting any new proposed development should be a key consideration of the Planning Department.

The town centre office market is small however with a large number of local occupiers in converted former residential properties. This is clustered around the Carnmoney, Antrim and Ballyclare Roads to include Portland Avenue. Again, the presence of solicitors, accountants, estate agents are seen as central to the role of the town centre in providing such services for its inhabitants. Alleviating parking constraints, once again, will help to make the town more attractive as an office location and attract new occupiers within the professional services sector.

There is no single property solution which offers a panacea to the problems facing the town. However, there are a number of smaller measures which together would certainly improve it. These are outlined in our Vision section at the end of this report.

With refurbishment and redevelopment of existing buildings complemented by initiatives to relieve the parking problem, coupled with public realm works to lift the character of the town centre, it is possible to envisage a much improved town centre environment and one which is attractive to pedestrian and car borne shoppers alike.

Customer/Shopper Views

XXX

Retailer Views

XXX

Urban Design Appraisal

XXX

Summary and Conclusions

XXX

Strengths	Weaknesses
Free access to public car park. Town Centre served by frequent bus services. Number of small, independent convenience retailers. Even land use distribution. Strong niche role in the service sector. Presence of a number of small, independent offices. Location in the midst of residential suburbs. High recorded footfall, comparable with other town centres of a similar size. The Tramway Medical Centre and Iceland are high footfall generators. Traditional town centre core has a high pedestrian flow. More peripheral areas still retain a reasonable footfall, especially on a Saturday. Town centre well used by local residents on a Saturday. Strategic location in close proximity to Belfast and the motorway network. Home to several popular restaurants and take-aways. Iceland is reported to trade very well in the town. Most of the major banks are represented in the town, supported by other services. Two medical centres are excellent footfall drivers and key assets to the town. The Movie House and the Sportsbowl are key assets as major leisure attractors. An already relatively vibrant evening economy. XXX	Congestion suffered on all approach roads. The four-lane Antrim Road dominates the Town Centre. Traffic presenting hostile environment for pedestrians. Town Centre only served by one pair of bus stops. Physical severance of the Town Centre by the Antrim Road. Footway's vary in terms of quality and width. Dropped kerbs are not comprehensive, impairing movement. Lack of provision for cycling. Low representation of convenience and comparison retail. High proportion of leisure services leads to lack of vitality during the day. High vacancy rate, most notably in the traditional retail core. Almost no residential properties within the town centre. Pedestrian flows are lower in more peripheral areas. Considerable leakage to nearby competing retail centres. Majority of occupiers are low quality, smaller independents. Shop fit-outs and frontages are ageing and in need of upgrade. Very low Prime Retail Rents. High turnover of local tenants in retail units. Little market interest in currently vacant units. Unattractive to both multinationals and indigenous retailers alike. Very limited range of local independent retailers. Lidl is physically disjointed from the town centre. Office development is deemed to be unviable. Existing pubs and bars not amenable to families and young people. Parking problems currently constraining growth in the leisure and catering sectors. Town Centre suffers from some anti-social behaviour in the evenings. XXX

Opportunities	Threats
Proposed 90 space ‘Park and Ride’ facility will provide an express bus service. High footfall improves viability of future retail, commercial and leisure developments. Lower cost option than that currently offered in competing centres. Significant expansion in the Northern Ireland leisure and tourism markets. Potential to attract a larger Children’s Indoor Play operator. Glenwell Road trading estate has potential to be a retail and leisure focal point. XXX	Competition from Abbey Centre and Northcott Shopping Centre. New Sandyknowes Centre to ‘soak up’ any demand from multinational retailers. XXX

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Figure 1.1: Glengormley Town Centre

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- Park
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- Car Parks
- Key Buildings
- Town Centre Units
- Housing in Town Centre

1. Introduction

1.1 Purpose of this Report

This report considers a range of information that provides an indication of the vitality and viability of Glengormley Town Centre. It has been prepared on behalf of the Department of Social Development and Newtownabbey Borough Council by Scott Wilson, in association with Colliers CRE, and will inform the formulation of a master plan for Glengormley Town Centre.

1.2 Town Centre Health Checks

National planning policy on town centre and retail developments for all of Northern Ireland is contained in Planning Policy Statement 5: Retailing and Town Centres (June 1996), as amended by the draft replacement Planning Policy Statement 5: Retailing, Town Centres and Commercial Leisure Developments (July 2006). The national policy recognises the special difficulties that have faced Northern Ireland's town centres, many of which are now showing signs of revitalisation.

As part of the evidence base required to underpin the formulation of statutory development plans, therefore, the main purpose of a Town Centre Health Check is to provide a baseline position, against which future measurement and regular monitoring can be carried out over the plan period. However, Town Centre Heath Checks will also assist in the identification of early signs of decline in a centre and, in the case of Glengormley Town Centre Regeneration Masterplan, will underpin the development of a non-statutory strategy to address any problems identified and provide a basis for the future enhancement of the centre.

The results of the Town Centre Health Check will be important in the consideration of the strategy for the town centre and in establishing a vision and role for the centre. It should provide information on "the overall strengths, weaknesses, threats and opportunities relating to town centres and of any key constraints affecting them."

In outlining the details of a Town Centre Health Check, Draft PPS5 states that the principal aim of a Town Centre Health Check is to "assess the vitality and viability of a town centre." Vitality is defined as a "measure of how busy a town centre is" and viability "a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing retail needs."

The following indicators are identified as key to providing the overall 'health check' of the town centre:

- Accessibility;
- Shopper/customer views;
- Retailer views (optional depending on time and resources);
- A comprehensive town centre land use survey, including the retail and commercial leisure land use profile;
- Vacancy rates;
- Pedestrian flow/footfall;
- Prime rental values (optional depending on data availability);
- Environmental quality, including the physical condition of the town centre, environmental attributes and the quality of the built and natural environment; and

- Physical structure of the centre, including opportunities and constraints.

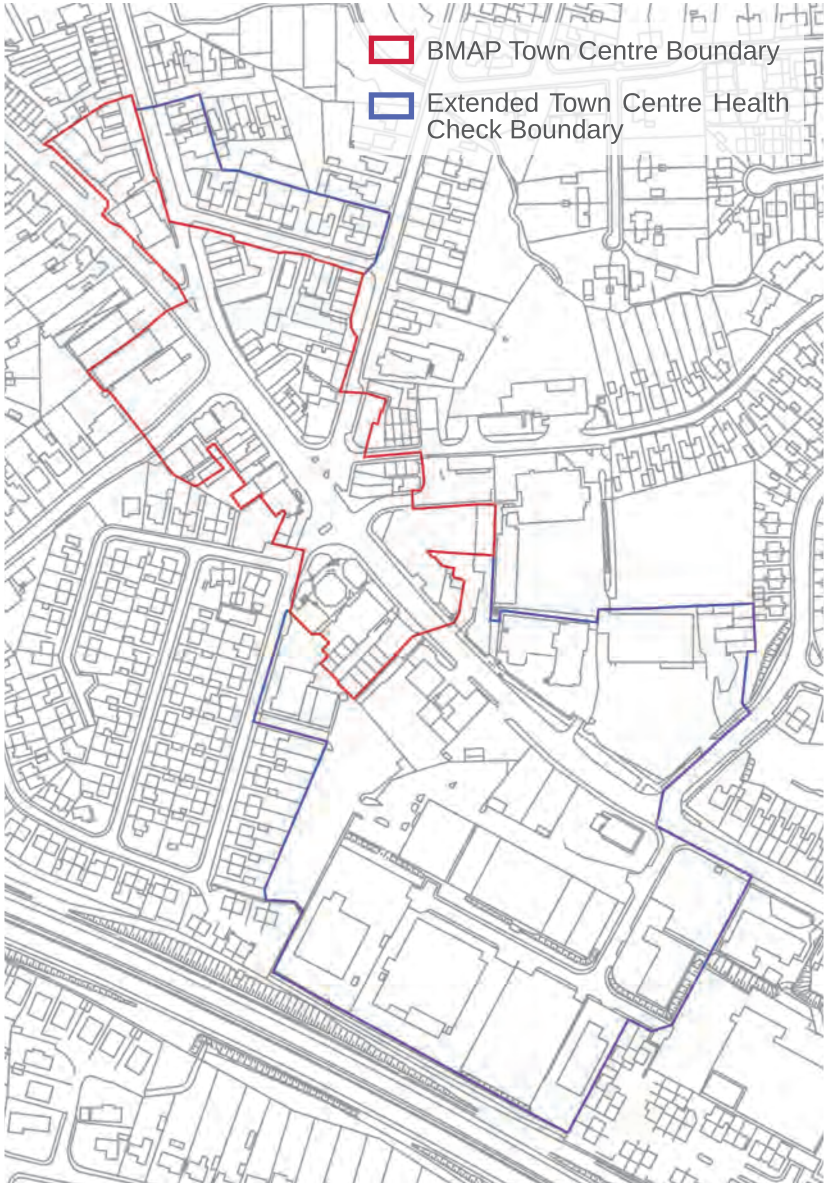
1.3 Glengormley Town Centre

Originally a village, Glengormley has grown as a ribbon of development either side of Antrim Road, one of the main arterial routes running into Belfast. The town centre is designated as a Local Centre in the draft Belfast Metropolitan Area Plan (BMAP) 2015, which states that "the existing traditional local shopping area provides shoppers in Glengormley with accessible convenience and non bulky comparison goods close to where they live." To strengthen the role of this local shopping area, the draft town centre boundary is delineated for the Local Centre to allow for expansion.

However, draft PPS states that the first step in the preparation of a town centre health check for is to *"identify each town centre boundary in broad outline to encompass the main uses, such as shopping, employment and service provision."* In the case of Glengormley, the land use survey (see Section 3) reveals that a number of 'town centre uses' are contained outside of the defined draft town centre boundary, but are within close proximity (i.e. less than 300 metres). For example, retail and service properties on the north side of Portland Avenue are excluded from the town centre, whilst properties with the same characteristics on the south side of the same street remain within the boundary.

Given that a number of the town centre uses that lie outside of the town centre boundary constitute a significant element

Figure 1.2: Town Centre Health Check Boundary



of Glengormley's town centre offer, we have therefore sought to expand the boundaries in a number of areas for the purposes of this town centre health check (see Figure 1.2). It should be noted that this does not reflect any potential change in the boundary for planning purposes, meaning that the subsequent masterplan will need to have regard to any policy restrictions placed on town centre developments outside of the draft BMAP boundary.

1.4 Broad Methodology

In accordance with the methodology outlined in PPS5, the Town Centre Health Check for Glengormley represents the culmination of a number of distinct strands of work. A detailed summary of the methodology and source of information for each indicator is contained within the relevant section, however the survey work undertaken can be summarised as follows:

- Desktop Review: A detailed review and analysis of existing published reports, plans and data sources;
- Pedestrian Flow Counts: A survey of foot fall throughout the town centre.
- Physical Town Centre Survey: Direct observation of the environment, retail offer and trading dynamics within the town centre;
- Household Survey: A telephone survey within a defined catchment area to provide robust data relating to:
    - Retail floorspace need/capacity;
    - Local catchment area;
    - Geographical trade penetration;
    - Levels and patterns of consumer expenditure; and
    - Consumer attitudes towards the town centre.
- Shoppers Survey: A series structure, face-to-face street interviews with shoppers in Glengormley Town Centre;
- Retailers Survey: A series of questionnaires completed by the 'manager' or 'owner' of units within Glengormley Town Centre; and
- Commercial/Market Analysis: An analysis of the commercial/market performance, demand and associated issues.

1.6 The Structure of the Report

This report is structured, broadly speaking, around these key PPS5 indicators and can be summarised as follows:

- **Section 2:** Accessibility;
- **Section 3:** Land Use Profile;
- **Section 4:** Footfall;
- **Section 5:** Market Indicators;
- **Section 6:** Customer/Shopper Views;
- **Section 7:** Retailer Views
- **Section 8:** Urban Design Appraisal; and
- **Section 9:** Summary and Conclusions.

2. Accessibility

2.1 Introduction

This section provides an overview of the accessibility of Glengormley Town Centre as an indicator of vitality and viability. Within PPS5, accessibility is defined as "the ease and convenience of access to a town centre by a choice of travel modes." Consequently, the accessibility indictor within a Town Centre Health Check should include:

- The location of the centre in relation to the strategic road network;
- The frequency and quality of public transport services, including the number of destinations and linkages to surrounding uses;
- The quality, quantity and type of car parking; and
- The quality of provision for disabled people, pedestrians and cyclists.

The strength of the centre will be dependent not only on the quality and diversity of offer, but also the degree of accessibility, which in turn influences the size and character of the catchment area. Its competitive position will depend on these characteristics compared to those of other centres. Within Glengormley itself, the degree to which the centre is linked or complementary to other facilities in the town will also be a key factor in determining its strength.

2.2 Travel by Private Car

There are no data on traffic flows in Glengormley. There are however reports from Roads Service and from the local sources that congestion occurs on roads approaching Glengormley centre. However, there are no data on the delays experienced, such as the impact on journey times, variability from hour to hour or day to day.

The A6 passes through Glengormley. South from the junction with Ballyclare Road towards Belfast it is marked out as 4 lanes, although where parking is allowed, parked vehicles restrict movement to one lane. In the central part of Glengormley the principal roads have extensive double yellow line parking restrictions, which is mostly effective in maintaining four running lanes. This does, however, make it difficult for pedestrians to cross.

The roads into Glengormley centre are mostly single lane with the exception of Antrim Road from the south, which is two lanes. Two lanes are provided at junction approaches, however, at Antrim from (from the north), Hightown Road, and Farmley Road. This provision appears to be based on the availability of space rather than traffic demand. For example, traffic demand is much heavier on Ballyclare Road joining Antrim Road from the north (single lane) than on Farmley Road joining Antrim Road from local streets and car parking.

In 2001 about a quarter of households in Newtownabbey had no access to a car or van, a little lower than the Northern Ireland average. However, there was considerable variation between different parts of the district. The figures for the main Glengormley Wards are shown in Figure 2.1.

For Newtownabbey as a whole, 74% of employed people travelled to work by car or van in 2001. This rose to 77.84% for journeys to a town/shopping centre (Telephone Survey).

Figure 2.1 Household Access to a Car

Ward	% Households Without a Car
Collinwood	10
Glebe	10
Hightown	22
Glengormley	33

Parking

There is one off-street pubic car park operated by Roads Service in Glengormley located at Farmley Road, with 138 spaces. Use of this car park in uncontrolled and free. There are no disabled spaces. There are no occupancy data for this car park.

There are in addition private off-street car parks associated with individual land uses, such as the cinema, restaurants and take-aways. No data are available on the quantity or occupancy of these car parks.

On-street parking is available on the side streets and along the kerbside of the principal streets away from the centre of Glengormley. In the centre, kerbside parking is mostly restricted by single or double yellow lines. This is generally effective in maintaining two running lanes in each direction on the Antrim Road (A6).

Some apparently recent development has been allowed with perpendicular parking onto the main street, in particular along Antrim Road (the A6) in the north of the town centre. Such development is normally resisted in Northern Ireland on safety grounds. Forecourt parking generally is common in Glengormley and by effectively surrounding the footways with cars creates an unpleasant walking environment. Figures 2.2-2.5 show some examples of this.

There are a few parking bays, for example in Carnmoney Road and Farmley Road. The latter bay is restricted to 1 hour maximum stay and has a disabled space.

Figure 2.2: Recent development with perpendicular parking on A6 Antrim Road

Figure 2.3: Forecourt perpendicular parking to A8

Figure 2.4: Forecourt parking Portland Avenue

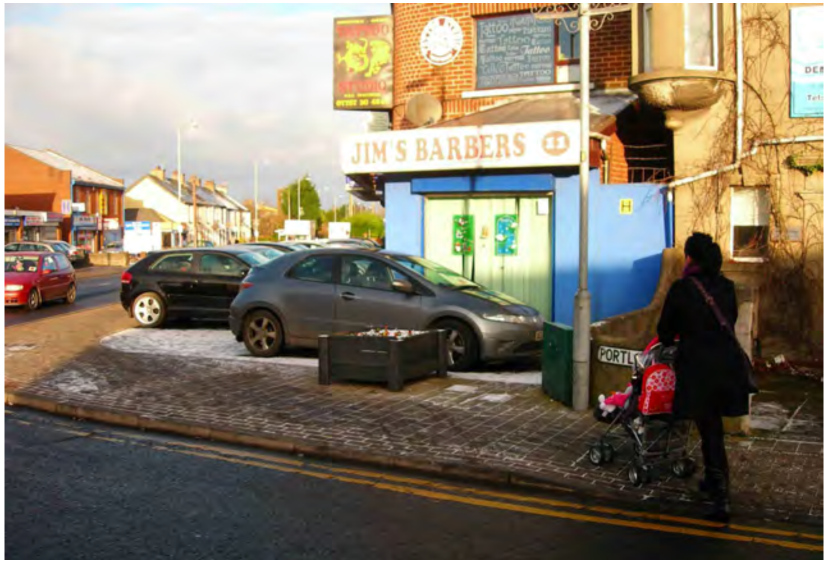


Figure 2.5: Forecourt perpendicular parking to A8 Ballyclare Rd showing impact on walking environment

2.3 Public Transport

Buses

All bus services pass through Glengormley and stop in the central part of Antrim Road. There is no "town" service as such. The 367 from Northcott to Greenisland/Jordanston is listed by Translink as a town service, but it does not serve the centre of Glengormley. All the services are operated by Translink Ulsterbus. There is no published route map.

The A6 and A8 are important for bus services, but there is only one pair of bus stops serving the centre of Glengormley, situated at the southern end near the pedestrian shopping precinct. This means that people instead of being able to arrive at one end of the centre and depart from the other, must instead return from the same location they started. Given how spread out the facilities in Glengormley are, this means a lot of unnecessary walking.

It is notable that Glengormley has very frequent bus services to the centre of Belfast, with 176 buses in each direction on weekdays. However, because of the large number of different routes making up the total, the buses do not arrive at regular intervals.

Abbey Centre is seen as a major retail facility for the area, and there are bus services to it 3 or 4 times hourly, although again not at regular intervals. The Valley leisure centre is served, though not much better than hourly during the day, and in the evening, when the leisure centre is busiest, there are no buses to or from Glengormley.

Figure 2.6 Bus services through Glengormley

Route	Origin - Destination	Trips Mon-Fri	Trips Sat	Trips Sun
1A	Glenville - Belfast	32	28	7
1B	New Mossley - Belfast	24	21	7
1C	New Mossley - Belfast	3	2	8
1D	Mossley (Glade) - Belfast	27	24	8
1E	Roughfort - Belfast	30	27	9
1G	Ballyhenry - Belfast	3	0	0
1J	Roughfort - Belfast	3	0	0
2B	Fairview - Belfast *	26	21	0
64A	Carnmoney - Belfast†	11	8	0
367	Northcott centre - Greenisland†	8	3	0
553A	Ballyclare - Belfast Express from Glengormley	17	11	0
	Total buses to Belfast	**176**	**142**	**39**
	Total buses to Abbey Centre	**45**	**32**	**0**

* *Serves Abbey Centre as well as Glengormley*

† *Serves Valley leisure Centre and Abbey Centre as well as Glengormley*

There are frequent buses (5 routes) between Glengormley centre and Northcott centre.

There are currently no proposals to provide any bus priority in Glengormley. Buses are subjected to the same delays experienced by general traffic, and this can disrupt journey schedules and reliability. Possible ways of helping buses, e.g. on Antrim Road and Ballyclare Road, have been discussed over the years, but no firm proposals have been put forward. There are bus priority measures on the Antrim Road towards Belfast, but that is some distance from Glengormley (beyond the Zoo).

There is a planning application in for a 90 space Park and Ride at the Ballyhenry Road junction with the M2 (near Junction 4) to link with express bus services to Belfast. This would serve people in Glengormley area who do not live near an express bus service stop. The planning application has stalled, however, due to objections locally.

The residents survey revealed that 14.10% of shoppers travel to their local centre by bus. Likewise, the shoppers survey revealed that only 10% of visitors to Glengormley had travelled to the town centre by bus. By comparison 76% had travelled in a private car and 13% had walked.

Taxis

There are two taxi companies in Glengormley. Both have limited off-street waiting space for taxis.

Figure 2.7: Physical Severance of the Community by the Four-lane A6 Antrim Road

Figure 2.8: Physical severance caused by wide spaces without pedestrian crossings

2.4 Pedestrian and Cycle Provision

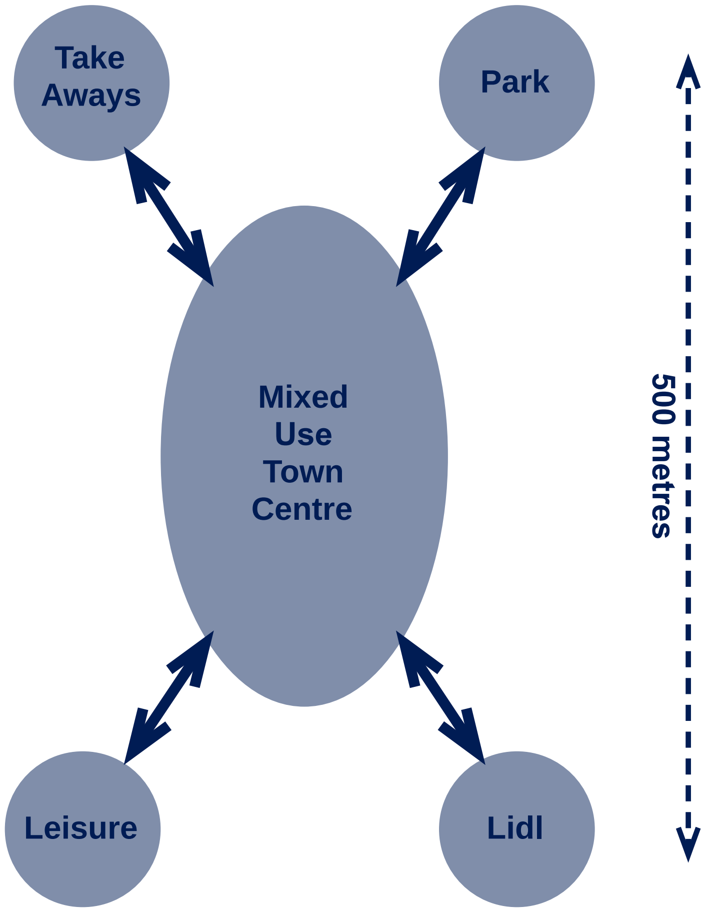
The most striking feature of Glengormley centre is its division by roads and junctions. Severance of the community by the A6 Antrim Road is especially severe, due to the width of the road (4 lanes), the speed of traffic, and the absence of pedestrian crossing facilities in the core part of the centre. There are numerous bus services, but a lack of stops makes bus use inconvenient.

The centre also lacks cohesion as a result of activities being located at discontinuous sites, and multi-purpose trips would involve considerable walking distance between different activities. Although no data are available, it seems likely that many people making multi-purpose visits to Glengormley would park separately for each purpose rather than undertake lengthy and unpleasant walks between different facilities. This spatial fragmentation of activities may explain the low levels of pedestrian activity observed.

The main facilities in Glengormley are separated into roughly five groups which may be represented diagrammatically as in Figure 2.9. Three of the five are rough groupings of a number of facilities, the other two are single facilities: the Park and Lidl. The central mixed facilities area suffers most from severance by the Antrim Road and its key junctions.

Another aspect to the function of Glengormley is the large number of take-way food outlets. These cater mostly to drivers (and their passengers) passing through and stopping off on the way to or from somewhere else. Therefore they tend not to generate much footfall.

Figure 2.9: Conceptual Map of Glengormley Links and Facilities



Pedestrians are catered for by footways on both sides of all the approach roads to and within the town centre. These are of variable width and quality. Paving quality is variable and dropped kerb provision is not comprehensive, making movement with wheelchairs, mobility scooters and buggies difficult, as illustrated in Figure 2.10 below.

Footways along the Antrim Road are mostly of adequate width, although the effective width is often reduced by temporary or permanent obstructions, as shown in Figures 2.11 to 2.14.

Walking is often difficult and unpleasant, and even unsafe due to drivers driving and parking on the footway. There seems to be very little respect for pedestrian space in

Figure 2.10: No dropped kerb at Portland Avenue makes walking difficult for some users

Figure 2.11: Good Quality Footway Outside Lidl

Figure 2.12: Enough Room for a Coffee Stop

Figure 2.13: Bus Passengers Obstruct Footway, Antrim Road

Figure 2.14: “A” Board Restricts Footway, Antrim Road

Glengormley centre, and in the wider district. Parking and driving on the footways appears not to be enforced.

There are no signal-protected crossings in the centre of Glengormley (Farmley Road, Carnmoney Road, Church Road junction). Signal pedestrian crossings are provided at the junctions between Antrim Road and Ballyclare Road, Hightown Road and Church Way (Lidl). Informal crossing places are provided in other locations, especially junctions.

The streets in Glengormley are dominated by moving and parked vehicles, both visually and in terms of impact on pedestrian behaviour. Crossing the street for the most part involves finding a gap in the traffic. The streets generally are laid out and managed as traffic priority areas, and drivers have unbroken right of way except at signals.

There are very few spaces where people can rest or sojourn. Road junctions have been laid out to maximise traffic capacity and are daunting for pedestrians to cross.

The result is a centre that has very little appeal as a place to spend time, to meet, or relax.

Figure 2.15: Police Set a Bad Example to Drivers Near Abbey Centre

Figure 2.16: Footway Parking and Driving Condoned in Glengormley

Figure 2.17: Parking Obstructs Footway, Ballyclare Road

Figure 2.18: Footway and Double Yellow Line Parking, Carnmoney Road

Figure 2.19: Footway Parking and “A” Board Make Walking Difficult, Portland Avenue

Cycle movement and parking

There are no cycle routes in Glengormley. No publicly available cycle parking has been recorded. From observation, cycling accounts for a small proportion of travel in Glengormley, although no data are available.

3. Land Use Profile

3.1 Introduction

In accordance with the guidance outlined in PPS5, this section of the health check reports the findings of the comprehensive town centre land use survey. This provides details of the proportion and broad location of specific land uses within the centre, as well as the proportion of vacant street level floorspace within the primary retail core. Finally, this section contains a brief retail profile, covering the existing composition, retailer demand and other potential changes.

Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. PPS5 identifies the importance of diversity to the success of a centre.

3.2 Land Use Profile and Distribution

The diversity of uses within a town centre contributes to the attractiveness of the centre to the local community. For the purpose of the land use survey, retail units have been divided into convenience and comparison businesses, with separate categories recorded for service uses. Those units which do not fall easily within any of these three main categories have been grouped into a forth 'miscellaneous' category.

The definition used for each of these categories is as follows:

- ***Convenience:*** Bakers and confectioners, butchers, confectionery, delicatessens, fishmongers, frozen foods, greengrocers, general grocers, health foods, markets, off licences, shoe repairs and key cutting, supermarkets, tobacco & newsagents, etc.

- ***Comparison:*** Art/art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemists, clothing, crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and durable goods, fashion accessories, florists, footwear, furniture, gardens and equipment, greeting cards, hardware and household goods, jewellery and watches, leather and travel goods, music, musical instruments and music and video recordings, stationers/office supplies, photographic and optical, secondhand goods, sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle/motorcycle sales and accessories, etc.

- ***Service:*** Retail Services (e.g. dry cleaners/launderettes, filling stations, hair dressers/beauty parlours, opticians, photo studios, repairs, alterations and restoration, travel agents, vehicle repairs/services, video/DVD rental, etc.); Leisure Services (e.g. bars/wine bars, bingo/amusements, bowling alley, cafes, casinos/ betting offices, cinemas, clubs/community centres, disco/nightclubs, fast food/take aways, hotels/guest houses, public houses, restaurants, sports and leisure facilities, etc.); Financial/Business Services (banks/ building societies, employment/careers advisors, estate/ letting agents, financial services, legal services, etc.); Public Services (e.g. Government/municipal buildings, emergency services, libraries, museums, art galleries, etc.) and Health/Medical Services, etc.

- ***Miscellaneous:*** Employment uses (offices, works, warehouses and factories, etc.), religious institutions and transport services, etc.

The survey recorded a total of 145 units within the town centre. An additional residential unit is also present, providing a combined total of 146. The distribution of these units is shown in Figure 3.2 Land Use Distribution on the following page. When compared to the average breakdown of land use within UK town centres, the survey reveals a number of concerning variations in the proportion and distribution of units with Glengormley Town Centre.

Whilst the number of convenience outlets in an average UK town centre is expected to be least represented (7.68%), the proportion in Glengormley is just over 2% lower than this average. The eight units are evenly distributed throughout the town centre and include a number of small, independent butchers and bakers as well as two small supermarkets.

This low representation in Glengormley is most likely a reflection of the strong competition provided by 'out-of-town' supermarkets in close proximity, most notably the Tesco Superstores at the Northcott Shopping Centre to the north and the Abbey Centre to the south east.

This is supported by the responses from the household survey, which revealed that 35.7% of respondents living within Glengormley would visit Tesco at the Abbey Retail Park to do their main food shopping, whilst a further 23.6% would use the Tesco at the Northcott Centre. By comparison, only 1.4% stated that Glengormley was their main destination for convenience goods.

The proportion of comparison outlets is also well below the national average, standing at only 14.48% of the total number of units. Traditionally the mainstay of town centres, such a low proportion of comparison goods retailers suggests a limited viability for the town centre. Again, the comparison units are evenly distributed throughout the town centre.

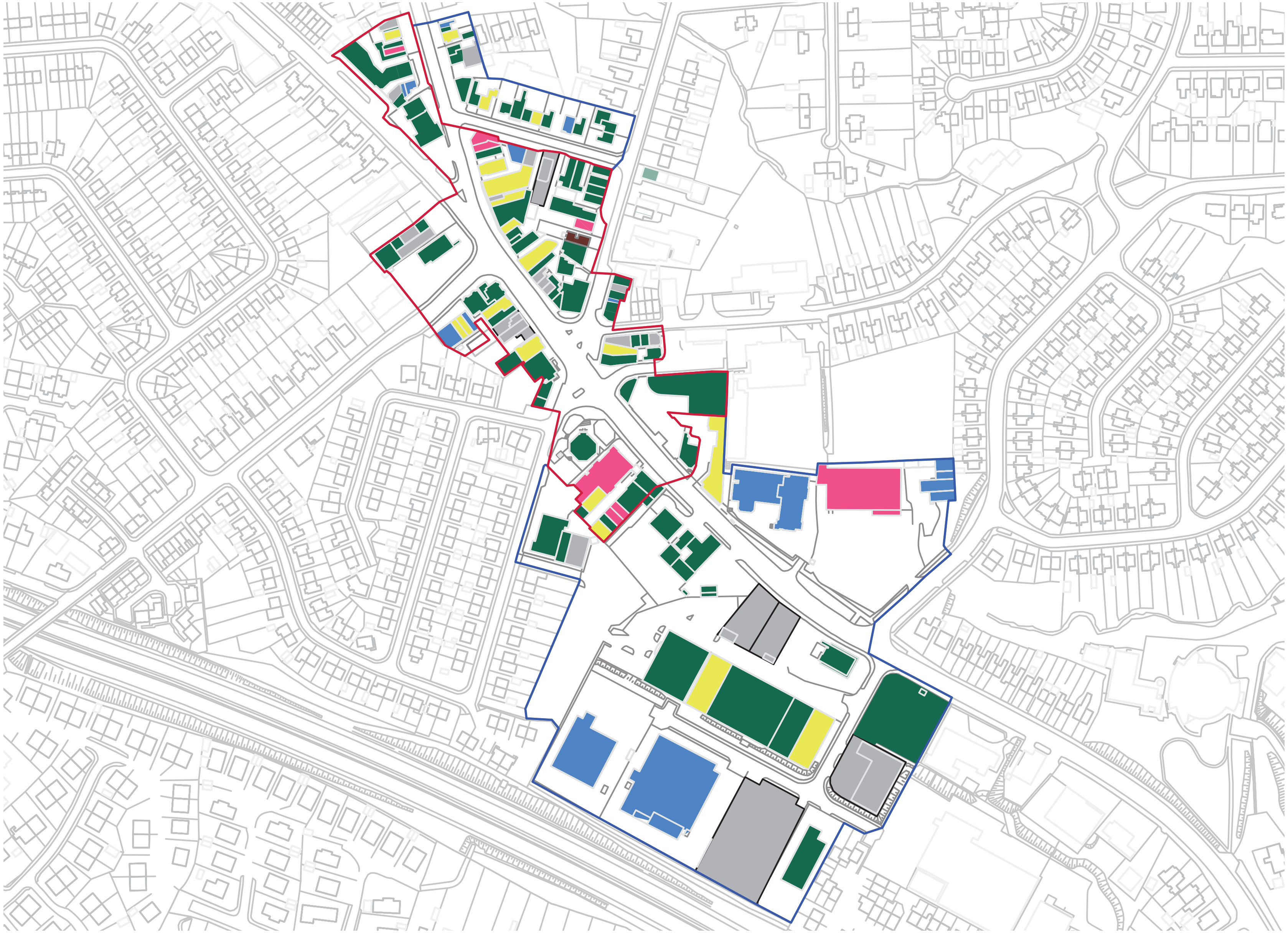
Again, the decline seen in traditional town centre uses within Glengormley is most likely attributed to competition provided by the Abbey Centre, which contains over 70 national multiple comparison goods retailers. By comparison, Glengormley lacks any large national multiple

Figure 3.1 Land Use Composition*

	Number of Outlets	Proportion (%)	All UK Centres Base (%)*
Convenience	8	5.52	7.68
Comparison	21	14.48	29.82
Services	80	55.17	43.10
Miscellaneous	15	10.34	9.44
Vacant	21	14.48	9.96
Total	**145**	**-**	**-**

* *Source: Experian Goad, October 2007*

Figure 3.2: Land Use Distribution



Key

- Convenience
- Comparison
- Services
- Miscellaneous
- Vacant
- Residential

retailers, instead containing a number of charity shops, second hand and antiques dealers and a few small independent retailers.

Again, this is supported by the responses from the telephone survey, which revealed that 44.3% of residents in Glengormley would visit the Abbey Centre for their comparison clothing and footware shopping. In addition to this, Belfast City Centre also provides strong competition for comparison shopping, with a further 32.9% of respondents to the survey living in Glengormley choosing to complete their main comparison shopping in Belfast. By comparison, only one respondent from the whole survey (0.2%) indicated Glengormley as their main comparison shopping destination. The results from the shoppers survey also followed this pattern, with 48% stating the Abbey Centre as their main centre for non food shopping, whilst only 1% responded with Glengormley

As a result of this decline in comparison goods retailing, Glengormley has developed a niche role in the service sector. This is a trend that is reflected across the country, with services making up the largest proportion of town centre units on average across the UK (43.1%). With over half of the outlets in Glengormley being classified as service sector, the proportion is approximately 12% above the national average. Again, the distribution of these units throughout the town centre is relatively even.

Financial and business services - retail banks and building societies, estate agents and mortgage advisors, solicitors, etc. - are particularly strong within Glengormley, making up approximately one third (35%) of the total service units. Hairdressers, barbers and beauty salons are also well represented.

The remaining service units mostly constitute leisure services, including 11 take away or fast food outlets, six cafes or restaurants, a cinema, bowling alley and bingo hall. This leisure service sector is therefore one of the key strengths of Glengormley at present, leading to a vibrant and vital evening economy, capable of capturing passing trade on the Antrim Road.

However, despite this positive impact, the high proportion of leisure services also leads to a lack of vitality during the day. Many of the take aways and restaurants, for example, would remain closed during normal business hours, resulting in a significant proportion of shuttered properties in the primary retail frontage during the day, detracting significantly from the shopping environment and vitality of the town centre. Those facilities that are open in the evening are also considered of poor quality.

This hypothesis is supported by the responses received from retailers in the town. Over 80% described the evening economy in Glengormley as “too quiet”. Furthermore, whilst Glengormley has a relatively high proportion of leisure and entertainment facilities, the majority of retailers surveyed rated their quality as ‘very poor’ (23.5%) or ‘poor’ (27.9%), whilst a further 23.5% suggested they were ‘neither good nor poor’.

Finally, most town centre would have a small proportion of miscellaneous units (just under 10%). In Glengormley, there are 15 miscellaneous units which equate to approximately just over 10%. The majority of these units are small independent offices, again reflecting the strength of Glengormley as a service centre. Whilst evenly spread throughout the northern part of the town centre, there is a small concentration of large miscellaneous units, accompanied by a number of vacant sites, to the rear of the cinema/bowling alley units.

3.3 Vacancy Rates

The vacancy rate recorded within the land use survey incorporates any vacant retail or employment units, gap sites within the main street frontages and derelict buildings. With 21 out of the 145 units within Glengormley town centre being considered vacant, the proportion is above the national average.

All town centres experience a baseline level of vacancy rates, even in the strongest centres. In many cases, for example, premises are often vacant while they are being refurbished. A high vacancy rate should therefore not always be interpreted as a sign of weakness. A large number of vacant units within a centre, however, may indicate decline related to poor performance of the centre or that the floorspace is inadequate to meet the demands of modern retailers.

In Glengormley's case, such a high vacancy rate would seem to be an indicator of poor vitality and viability. In particular, there are a number of vacant units and a vacant development site fronting onto the Antrim Road between the junctions with Hightown Road/Ballyclare Road and Carnmoney Road. This area would have once formed the traditional town centre core, but has now suffered major decline, exemplified by the concentration of vacant units.

It is likely that many of the traditional units are too small to meet modern retailer requirements and the presence of vacant sites suggests a weak market to enable redevelopment. Whilst two vacant sites adjacent to each other fronting onto Antrim Road and two larger vacant sites further south provide a potential opportunity for some form of redevelopment, the majority of the vacant units would provide little scope to improve the physical structure and environmental quality of the town centre.

3.5 Residential Units

There is only one residential unit within Glengormley Town Centre, which accounts for approximately 0.68% of the total number of units within the town centre.

Housing stock can make a significant contribution to the variety and vitality of life in a town centre and it is widely accepted that town centre living provides a more sustainable pattern of development, assists urban regeneration and epitomizes existing infrastructure. It encourages the development of 'walkable communities', which provide environmental benefits by reducing the need to travel by private car, and community benefits to people such as the elderly and young people who don't have access to a car. It can also help revitalise the physical fabric of a town centre through the re-use of vacant buildings and the redevelopment of derelict or otherwise unattractive land. A resident population can also provide benefits in terms of activity and surveillance outside normal commercial hours, helping to improve safety and security in the town centre and supporting the growth of an evening economy.

Given these potential benefits, the virtual absence of residential accommodation within Glengormley town centre can therefore be considered a weakness, detracting from the overall vitality of the centre. However, as part of metropolitan Belfast, the town centre is surrounded in all directions by residential suburbs. There is therefore a large catchment population within walking distance of the shops and services within the town centre, which, if effectively captured, should help to ensure the continued viability of the centre.

3.4 Retail Profile

XXX

4. Footfall

4.1 Introduction

Pedestrian flows provide a useful indicator of relative strengths of different parts of a town centre. In accordance with the guidance outlined in PPS5, pedestrian flows, or footfall surveys, have been completed at a variety of locations around Glengormley Town Centre, providing details of the numbers and movement of people on the streets at different times of the day.

4.2 Methodology

Two-way pedestrian flow counts were undertaken at six locations within Glengormley town centre. The locations of all count points were agreed with the Department of Social Development prior to the survey.

The counts took place between 10.00 hours and 16.00 hours daily on Friday 9 and Saturday 10 April 2010. At each point pedestrian flows were counted for an agreed period of time each hour in both directions. The results were then grossed up to produce equivalent hourly flows in each direction at every point. The sum of the hourly flows for the six hour period gives the estimated daily flows.

The numbers quoted as part of the footfall survey therefore represent estimates of the total number of pedestrians passing each survey point over a six hour period between the hours of 10:00 and 16:00 on a Friday and Saturday, and during the whole week (Monday-Saturday). The numbers given for the whole week are the sums of those given for Friday, multiplied by five to allow for the days Monday-Thursday, which were not enumerated, and Saturday.

The indices given in the Figure 4.1 for Friday, Saturday and the whole week are percentages based upon the flow at the busiest of all seven count points, which is benchmarked at 100 percent. Figure 4.2 then shows the indexed count points relative to the average pedestrian flow and indicates the locational hierarchy throughout the town centre.

4.3 Pedestrian Flows

At the busiest location in the town centre - the Tramway Centre - it is estimated that the footfall in both directions would exceed 27,000 over the course of a week. This is broadly comparable with town centres of a similar size across Northern Ireland, but is below the weekly flow estimated in larger, more vibrant town centres.

It is no surprise that the highest footfall over the course of a week is recorded at this location. The Tramway Medical Centre and Iceland, both accessed through the Tramway Centre, are know to be high footfall generators. This is supported by the outcome of the shopper survey, with 45% of shoppers stating that Iceland is one of the most important shops within the Town Centre.

That said, it is worth noting that the only set of bus stops serving the town centre are located immediately in front of the Shopping Centre. Similarly, the only public car park serving the entire town centre is also accessed through the Tramway Centre. There is therefore a strong possibility that the pedestrian counts recorded in this location could have been artificially inflated by both car bourne shoppers and those using public transport.

Figure 4.1 Pedestrian Counts in Glengormley Town Centre

Enumeration Point		Friday		Saturday		Week	
		Count	Index	Count	Index	Count	Index
1	Euro Hand Car Wash - Sandra's Village Home Bakery, 9 Ballyclare Road	2.425	51.9	4.075	94.8	16.200	59.8
2	M D Loughery Solicitors - J W McNinch & Son Solicitors, 16 Portland Avenue	1.850	39.6	2.225	51.7	11.475	42.3
3	Belfast Telegraph Newsagents - Glengormley Baptist Church, 12 Carnmoney Rd	2.775	59.4	4.300	100.0	18.175	67.1
4	The Glen Inn, 335-337 Antrim Road	4.175	89.3	3.800	88.4	24.675	91.1
5	Entrance to Tramway Shopping Centre, Antrim Road	4.675	100.0	3.725	86.6	27.100	100.0
6	C C R Cabs, 2 Hightown Road	2.125	45.5	2.550	59.3	13.175	48.6
	Averages	**3.004**	**64.3**	**3.446**	**80.1**	**18.467**	**68.1**

Count Number in 1,000s

Further north, within the traditional town centre core, the footfall begins to fall. In particular, there is a gradual tailing off as you move north along Antrim Road. Outside the Glen Inn, for example, the estimated weekly footfall is just over 24,500, 8.9% below that at the Tramway Centre. This is the second highest pedestrian flow recorded within the town centre.

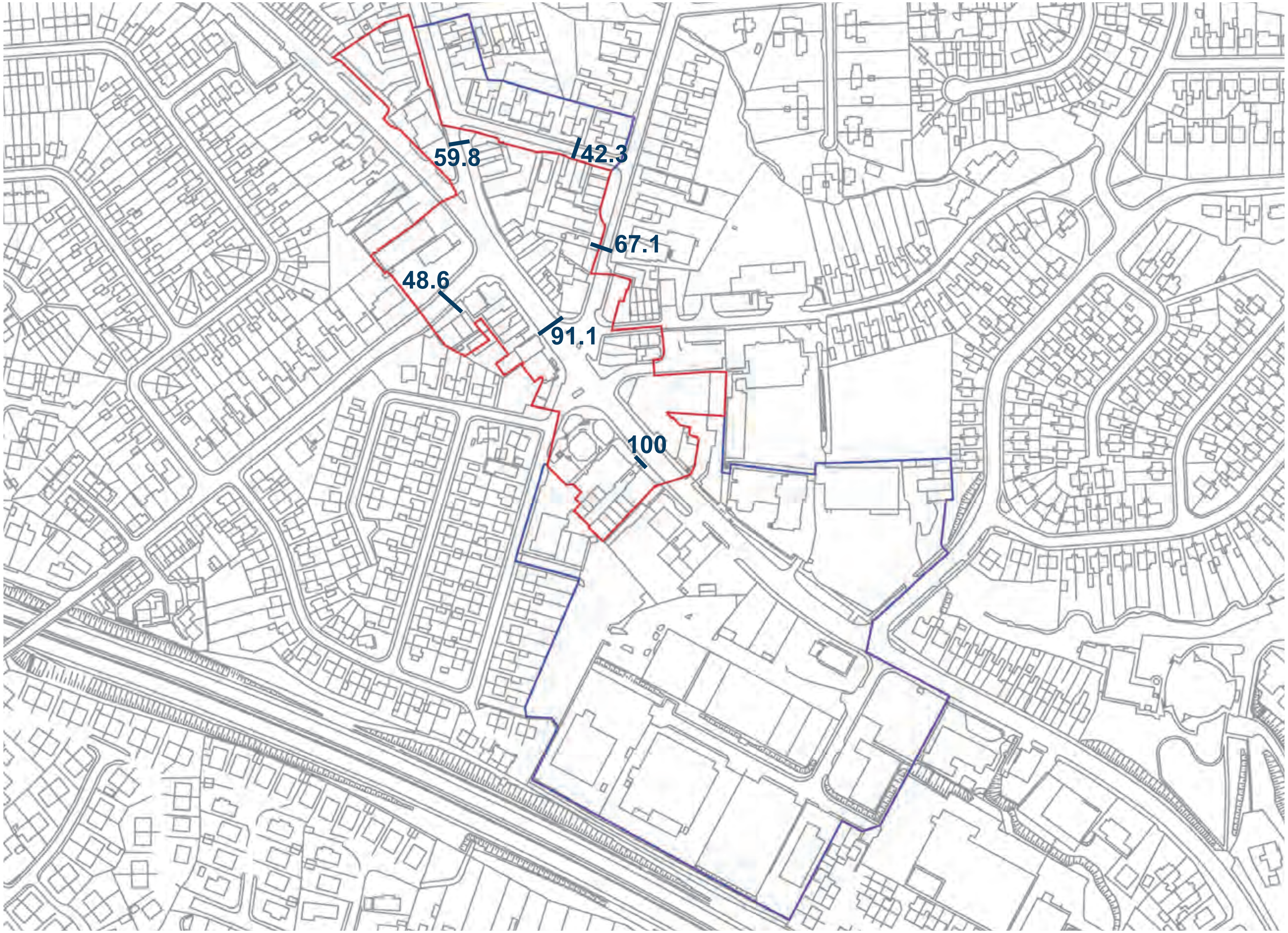
Such a high footfall in this location is surprising given the concentration of vacant units on either side of the Antrim Road just north of the count point. There are a number of potential explanations for this. Firstly, the Glen Inn is reported to trade very well, and is therefore likely to generate a good footfall at certain times of the day. However, the busiest time for a traditional pub is during the early evening and night-time (i.e. 5pm onwards).

Alternatively, the high footfall could reflect the movement of shoppers from the bus stops or public car park near the Tramway Centre, to visit other services in the northern area of the town. This would mean that the footfall simply reflects passing trade, rather than shoppers visiting this area of the town. This would also support the possibility of the high footfall at the Tramway Centre being partially attributed to the car park and bus stop in that location.

Whatever the explanation for a high footfall in this area, despite a high concentration of vacancies and dereliction, it is clear that a high flow of potential shoppers at this point can be considered a strength for the traditional retail core.

In the four remaining points the footfall is significantly lower than these two primary locations. However, in contrast to many town centres, the footfall in each of these locations is relatively even. It is common in even the best performing town centres to find a dramatic tail-off in footfall in the more peripheral areas; however in Glengormley the tail-off seems lower and evenly spread.

Figure 4.2: Weekly Pedestrian Flows Expressed as a Proportion of Peak Flow (%)



This reflects the relatively compact nature of the town centre and can be considered a strength. The lowest pedestrian counts were recorded on Portland Avenue, which has 42.3% of the benchmark weekly peak flow.

Of particular note is the strong performance of these peripheral areas on a Saturday, especially when compared to the highest performing locations over the course of a week. For example, the count point on Carnmoney Road provided the highest pedestrian flow of any location on Saturday at 4,300. The second highest flow on Saturday was on Ballyclare Road at 4,075. The Glen Inn and the Tramway Centre recorded 3,800 and 3,725 respectively on the Saturday.

This reversal in footfall at a weekend may be an indication that the town centre is well used by local residents on a Saturday, which should be considered a real strength. In particular, the presence of all the major banks and building societies is likely to attract customers who are unable to access such services during the working week. Once again, the large catchment population within walking distance of Glengormley should be considered a real strength of the town centre.

Finally, specifically in relation to the high pedestrian flow on the Carnmoney Road, it is worth noting that there are a number of attractions just outside of the town centre. Moving north along the Carnmoney Road, Glengormley Park lies 300 ft. to the north of the town centre. Glengormley Library lies immediately adjacent to the park, with the Carnmoney Road Shopping Centre just beyond, less than 0.25 miles from the town centre. The Shopping Centre, in particular, contains a medium-sized Tesco supermerket, as well as a number of smaller, independent units.

It is possible that visitors to the town centre would travel to any of these attractions whilst visiting the town centre, which could explain the higher footfall in this location. However, many of these attractions would serve the local community who would not necessarily originate in the town centre. In addition, each of these services have free parking available.

Again, whatever the explanation, it is clear that the high footfall in the town centre is a strength, which will help ensure the viability of any future retail, commercial or leisure developments within the town centre.

5. Market Indicators

5.1 Introduction

PPS5 suggests that Prime Rental Values provide a direct indication of retailer desire to locate within an area, which consequently reflects the confidence investors have in the vitality and viability of the centre. This section of the Town Centre Health Check has been prepared by Colliers CRE and asseses Glengormley Town Centre from a market perspective and outlines what potential opportunities and threats it faces in the short-medium term.

5.2 UK Retail Market Overview

The UK Retail Market is currently undergoing a period of correction. Colliers CRE 2009 Midsummer Retail Report forecasts that rental values will fall by 23% by the end of 2010. The worst economic recession since the 1930s has taken its toll on the retail sector with capital values for some properties falling by up to half.

Retailers have reported “challenging” trading conditions across the board with the notable exception being those at the value or discount end of the spectrum apparently trading much better than those positioned at the middle and higher ends.

2009 and 2010 have witnessed a large number of high profile retailer administrations, the net effect of which has been to increase the rate of voids in UK shopping centres and high streets. Opportunistic discount retailers are taking the opportunity of ever increasing voids to negotiate low rents and large incentives in taking new units.

Landlords appear to have learnt the lesson of the early 1990s, in part forced upon them by the Government’s implementation of full vacant rate payments and are now prepared to keep units occupied almost on any terms. Rent free periods and/or incentives equal to two or three years are common place with extreme examples of five or even six years rent free being accepted. Short term leases on a turnover basis are often being entered into. The occupancy of a unit helps maintain vibrancy and a feeling of well-being in shopping centres and high streets.

The recession has witnessed the first drop in prime rents since the recession of the early 1990s, when rental values fell for three consecutive years from 1991 by -2.4%, -4.1% and -3.2% respectively, highlighting the comparative severity of the current economic climate and its impact on the retail market.

5.3 Glengormley Context

Glengormley is set within the Newtownabbey borough approximately 6 miles north of Belfast and borders North Belfast, Carnmoney and Mallusk. The town enjoys a highly strategic location in close proximity to Belfast and the motorway network (via the M2). It has as such become a popular commuter town and has witnessed significant expansion since around the early 1990’s.

In retail terms, Glengormley town centre supports a nucleus of smaller shops primarily focused around the junctions of the Antrim, Ballyclare and Carnmoney Roads. This is augmented by a now aging retail / leisure development to the South of the main junction on the Glenwell Road.

The perception is that there is considerable leakage to nearby competing retail centres predominantly The Abbey Centre and Abbey Retail Estate (less than 10 minutes drive time) and Belfast City Centre (15-20 minutes drive time).

Glengormley has a small stock of business units, in the form of offices and small warehouses. Nearby Mallusk is the principal office / warehousing location within the immediate area. There is however a considerable number of smaller offices and warehouse units in the town supporting a small number of local business.

From a leisure perspective, Glengormley town centre offers a large number of restaurants and take-aways, some of which are very popular and are considered to draw custom from relatively long distances. There are a number of more traditional pubs in the town.

5.4 Glengormley Retail Market

Current Retail Landscape in the Town Centre

Glengormley has a compact centre which is centred on the junctions of the Antrim, Carnmoney and Ballyclare Roads.

The **Ferbro Buildings** located to the north of the Ballyclare Road junction on the Antrim Road provide a number of terraced shop units and fast food outlets. The **Olivia Centre**, also at this northern end of town comprises Xtravision, The Khyber and the Gondala (a new Italian restaurant). At the other end of the retail core is the **Tramways Centre**, a part new / part refurbished scheme anchored by Iceland and The Medical Centre.

As is discussed in more detail below, the majority of the occupiers in the town centre are primarily low quality smaller independents, banks, estate agents and charity shops which in our opinion fail to generate a sense of place or an attractive shopping environment.

These occupiers tend to occupy small "lock up shops" in small terrace buildings. Fit-outs and shop-fronts are generally aging and tired which creates a town centre lacking in quality and in need of comprehensive upgrading and inward investment.

It appears to be an opportune time to re-visit the retail provision in the town, upgrading and adding to it as appropriate

Retail Rents – Glengormley

The size and occupier profile of Glengormley is such that retail rents are increasingly not calculated on a zone A basis, but rather on an overall basis.

Prime Rents typically reflect c. £10 - £15 per sq ft for standard sized units up to 1,000 sq ft. Larger units will attract a further quantum discount. This figure is low, and in our opinion is reflective of the parking and congestion issues facing the town and the implications that these carry for successful retailing.

This prime stretch within Glengormley, located as it is, on a principal arterial route is comparable to other suburban arterial route retail centres in suburban Belfast such as Belmont, Ballyhackamore, the Ormeau Road, the Andersonstown Road and the Falls Road. In general terms, rents in these locations would be higher than those paid for comparable retail accommodation in Glengormley. It is notable that these locations would be generally less congested than Glengormley and also typically offer roadside parking, making the retail units much more accessible for car borne shoppers.

The town centre in recent years has been characterised by a high turnover of predominantly local tenants. Whilst the number of vacancies is currently low, there has been considerable amount of tenant churn, reflecting difficult trading conditions generally and more particularly, the ongoing problems being encountered by traders in the town centre.

Relatively low rents however are something of an attraction to retailers. To be competitive, the Town Centre will have to build from a relatively low base in rental terms. It will find it hard to compete with its competitors unless it can provide an alternative lower cost option than that which is offered in the competing alternatives.

Recent Transactions

Recent transactions within the Retail Core have been very limited with little in terms of actual transactions to report. BTW Shiells have been marketing the former and somewhat landmark "Cartmills" building in the town for approximately 1 year. They are proposing to subdivide the property providing small lock up shops of c. 700 – 800 sq ft. They are quoting rentals of £20 per sq ft. We are advised that there is no current interest in the property and it therefore remains "to let".

Otherwise transactions have been few reflecting the wider implications of the "credit crunch" and its constraining effect on the expansionary policies of retailers. Secondly, Glengormley Town Centre's relatively small size and its secondary status in terms of retail positioning when considered with neighbouring retail centres, has rendered it relatively less attractive for both multinationals and indigenous retailers alike.

Proposed Developments

The triangular shaped site at the junctions of the Ballyclare and Antrim Roads (currently a car wash) was purchased in 2004 (we understand this was by the owner of the adjacent Ferbro Buildings presumably for an extension to his existing scheme). It is a very prominent site and its current use does little for enhancing the visual amenity in the town centre but thus far, remains undeveloped. We are not aware of a planning application having been lodged.

The Local Independent Sector

Glengormley has a limited range of local independent retailers. Some of the better known of these retailers include: **Dundees Pharmacy**, a well established local chemist; and, **Motorstore Car Spares**, an established Motor Factors. **Video City** also have representation in the town.

Cartmills are another well regarded local independent fashion retailer but who are now all but closed, reportedly now operating on a very scale.

Over the years many other of the more established independent retails such as **Mawhinneys**, a former local greengrocer have also closed a number of years ago.

Multinational Retailers

The principal multinational retailers are **Iceland**, **Jollyes**, **Lidl** and **Xtravision**. Iceland is reported to trade very well in the town and represents a key town centre anchor. The Lidl is physically disjointed from the town centre and invariably attracts car borne shoppers so its role in attracting symbiotic trade to the town centre is questionable.

Again the town's proximity to other larger retail centres is stressed as having been a coercive influence in attracting multinationals to the town. It is worthy of note that the town previously incorporated both a **Your More Store** and a **Shop Electric**. Since the demise of both however, the town has not attracted multinational occupiers to fill their then vacant units.

Banks / Building Societies

Most of the major banks are represented in the town centre including **Ulster Bank**, **Northern Bank**, **Bank of Ireland** and **First Trust**. There are also a number of building societies including **Abbey National**, **Progressive**, **Nationwide** and **Halifax**.

Financial / Professional Users

The concentration of these financial A2 uses is supported by a large number of professional ground floor offices hosting solicitors, estate agents and a few accountants. The dominance of the financial and professional services sectors in the town centre is therefore stressed.

Charity Shops

There are also a number of charity shops in Glengormley. Whilst not particularly conducive to creating a well regarded retail environment, their presence is typical of arterial route locations.

Medical Centres

The Tramways Medical Centre, part of the Tramways centre is an excellent footfall driver and a key asset to the town centre. At the northern end of town the Glengormley Medical Practice also draws footfall.

5.5 Competing Retail Centres – Retail Leakage

Glengormley's large catchment population is an obvious strength from a retail perspective however its proximity to competing retail centres is, by implication a threat.

The principal competition can be listed as follows:

Belfast City Centre

The City Centre has been somewhat rejuvenated from a retail and leisure perspective with the opening of Victoria Square Shopping Centre. This scheme is Northern Ireland's largest shopping centre. It provides a number of points of difference relative to regional towns. Its strong retail offer (House of Fraser, Build a Bear, Tom Tailor, LK Bennett for example) complemented by a strong restaurant offer (Nandos, Pizza Express, TGI Fridays) provide the rationale for shoppers to visit. The majority of the schemes Tenants are not represented elsewhere in Northern Ireland.

Abbey Centre, Newtownabbey

The Abbey Centre is within a 5-10 minute drive time from Glengormley. The scheme is anchored by Dunnes, River Island, Next and others in addition to a Marks and Spencers and Tescos in the adjacent retail parks further serves to strengthen its appeal.

Northcott Shopping Centre

The Northcott Shopping Centre (c. 130,000 sq ft) is located on the edge of Glengormley on the Ballyclare Road. The scheme, which was constructed in the late 1980's, is anchored by Tesco and comprises a mix of local and national tenants (including Superdrug, H Samuel and Barratts). The scheme is currently run-down and in poor condition.

This is imminently to change however as it is to be completely redeveloped. Works are due to commence in 2011, subject to securing vacant possession. It will be known as Sandyknowes Shopping Centre and will include a food superstore, cafe, 12 mall units and petrol filling station. Tesco will remain at the expanded site and double the size of their existing store to approximately 85,000 sq ft. It is believed a number of the other national retailers have also committed to continue trading at the new scheme. The size of the entire scheme will increase to 200,000 sq ft.

Whilst many in the local area believe that a rejuvenated scheme will benefit the Glengormley area, there is little doubt that its redevelopment will represent an increased level of competition to the town centre. Newly constructed Grade A units adjacent to a "food anchor" (Tescos) will be eminently more preferable to retailers than a town centre beset by parking shortages and which doesn't offer retailers large enough or sufficiently specified modern units from which to trade.

It is against the backdrop of ever improving competition, that the town centre itself will need to address its problems and seek to carve out a discernible niche amongst an opportunity set of competing alternatives.

5.6 Future Retail Strategy

Multinationals who may be attracted to Glengormley

In our opinion, a newly developed scheme of sufficient critical mass would attract a number of multinational retailers. Glengormley does however not offer the catchment to be considered by the large majority of multinational brands (in particular, many of the fashion retailers) but there are, in our opinion a limited number who would consider the town if an appropriate retailing environment could be provided.

Multinational dominated shopping destinations are characterized by "critical mass", that is a large number complementary retailers which together attract a diverse range of shoppers.

These retailers are listed below.

- M&Co – 7,000 sq ft
- Cheque Centre – 1,000 sq ft
- Co-Op convenience – 3,000 sq ft
- B&M Bargains – 7,000 sq ft
- Home Bargains – 6,000 sq ft
- Poundworld – 4,000 sq ft

- Poundland – 6,000 sq ft
- Semi-Chem – 2,000 sq ft
- Savers / Superdrug – 3,000 sq ft
- Cash Converters – 2,000 sq ft

To some extent, this list reflects the current economic climate and the fact that those retailers who are currently acquisitive tend to be towards the value end of the spectrum. It is these retailers who are most likely to have an interest in the town.

These multinational retailers will **not** be attracted to the town on a piecemeal or one by one basis. They will only come to a new development of sufficient critical mass and which promotes a tenant mix that will draw a wide range of customers. We would suggest that any new retail provision would comprise at least 7-8 new appropriately sized retail units such that the above named retailers can take comfort from knowing that other good complementary retailers can be accommodated alongside them.

The town does not currently meet the size and specification requirements of typical multinational retailers, as such, legitimising a role for the development of suitable accommodation in the town.

It should be noted that The Sandyknowes Centre is likely to "soak up" some of this latent demand in the 12 new units to be created as part of the redevelopment. The retail sector is however a dynamic sector and we do believe that suitable town centre accommodation would be attractive to "new" retailers, particularly when combined with a cohesive Leisure offer.

Size and Specification Requirements of Multinational Retailers

In general terms, the size and specification requirements of such retailers are discussed below:

- Units ranging from 2,500 – 10,000 sq ft.
- Regular shaped units without steps / ramps or other changes in level at ground floor level.
- Minimum frontage: 6 metres (8-10 metres for larger units).
- Floor to ceiling shop fascias for display.
- 3 Phase electricity supply.
- Goods lifts / Amenity Block / Disabled W.C's / Screeded floors.
- Rear service access and servicing areas.

The existing building stock in the Primary Retail Core could broadly be described as aging converted terrace buildings which do not adequately meet the needs of modern retailers.

5.7 Glengormley Office Market

The office market in the town would be characterized by smaller offices in converted former-residential buildings along the Antrim, Ballyclare, Carnmoney and surrounding roads. These tend to be either owner-occupied or rented space in small office buildings or above retail or commercial space. Typical occupiers include a number of estate agents as well as solicitors, accountants and other similar small consultancy practices.

Speculative development of offices on a large scale in the town centre is deemed unlikely and inefficacious from a viability perspective. Over the course of the Masterplan timeframe it is envisaged that Mallusk will remain the principal office location in the area with Glengormley appealing to smaller "service" based offices, occupying converted residential buildings.

5.8 Leisure and Tourism

The Leisure and Tourism market in Northern Ireland is undergoing significant expansion with year on year increases in visitor numbers to the province over the past number of years.

The Executive's Programme for Government has set Northern Ireland tourism challenging targets over the next three years. These include increasing visitor numbers from 1.98million to 2.5million by 2011, and growing tourism revenue from £370 million to £520 million.

It is widely acknowledged that Northern Ireland and Co. Antrim is rich in natural beauty with widespread areas of special interest. It is felt that Glengormley could capitalise on this and in particular its close proximity to both Bellevue Zoo and Cavehill Country Park. The potential to further enhance the catering offer in particular and in so doing attract to Glengormley, families and visitors of both of these attractions, is stressed.

Both the **Movie House** and **The Sportsbowl** are key leisure attractors to Glengormley at the current time and draw not only from Glengormley, but also from the wider East Antrim area. They should as such be regarded as key assets for the town. Again, the potential to augment this with other retail and leisure attractors (bars, restaurants, new retail provision with adequate parking) is stressed.

5.9 Future Leisure Market

The mix of uses that can be grouped together include:

Children's Indoor Play Park / Activity Centre

Glengormley has a large number of resident young families. There is currently a children's play facility called **Funworks** in the town. This is a reasonably good facility. It is suggested however that there is scope for an even larger facility which might provide more of a regional draw. A larger, perhaps branded multiple operator would not only be an important attractor to the town centre but would also further boost both the evening and daytime economies.

A large Children's Play facility would require 10,000 sq ft.

Restaurants / Cafés

Glengormley already has a large number of restaurants and cafes, most of which are lower quality and not particularly attractive. Increasing better quality and more family-friendly restaurants and cafes will further enhance attractiveness of the town, amongst residents and visiting shoppers.

Higher End Bars / Wine Bar

A good quality wine bar / bar could prove instrumental in attracting growing number of resident and visiting young professionals to the area.

5.10 Existing Hotels / Restaurants / Pubs and Clubs

There are a number of pubs / bars in Glengormley town centre. For the large part, these are considered to be more traditional drinking establishments and not particularly amenable to families and young people.

The **Bellevue Inn** (edge of town centre), **The Glen Inn** and **Toms Bar** (the former Village Inn) are the best known bars; however none of these would be associated with improving the retailing amenity in the town. The **Thunderdome Café** is a more family friendly environment (bar and restaurant) albeit seems to be suffering from the recent economic downturn.

The Khyber (an Indian restaurant) is a particular local success story. Anecdotally, we are advised that patrons regularly travel more than 30 miles to visit this restaurant. Proof that a successful catering offer can be very successful in Glengormley.

Other than this, there is a proliferation of relatively mid-market fast food outlets in the town centre, many of which have traded for a considerable number of years. **Indian Ocean**, part of a local chain of restaurants has recently opened in the town centre.

There are two fast food multiple restaurants in the town: **KFC** and **McDonalds**. Both are popular and are reported to trade well.

All of which is to say that Glengormley's evening economy is already vibrant. Granted, we believe that there is added scope for a more family friendly leisure offer and as above, the potential to raise the profile of Glengormley's leisure offer amongst patrons of the zoo and visitors to the Cavehill Country Park is stressed as a key opportunity for growth.

Irrespective of this, with a large number of young families living in the Glengormley area, there is added scope for more family friendly restaurants. The above mentioned parking problems are currently a constraint to growth in this sector.

5.11 The Town Centre Residential Market

We believe that there is further scope for apartments in Glengormley although the town centre boundary is very compact. As such, residential uses might best be accommodated slightly outside the Masterplan boundary, given the apparent lack of suitable opportunity sites. This is also at the risk of intensifying the parking issue.

Glengormley is a good commuter location and is already popular amongst young professionals. Along with improvements to the evening economy and a reduction in anti-social uses in the town centre, Glengormley could attract such occupiers in greater numbers.

5.12 The Importance of Public Realm

Shopping has become more of a leisure activity. Customers increasingly demand shopping environments that are attractive and pleasant. Successful retailing has become about customers having an authentic experience. Increasing footfall and 'dwell time' accounts for why so much effort is put into creating attractive destinations where people want to visit.

All of which is to say that any future town centre scheme should be designed around significant public realm. The provision of high quality paving, sculptures, seating and street lighting would have very significant implications for the attractiveness of the town centre for visitors and shoppers alike. The town suffers from some antisocial uses in the evenings and public realm works could have a part to play in reducing this.

5.13 Vision

At the heart of our vision for Glengormley Town Centre is a rejuvenated and comprehensive retail / leisure offer incorporating the following:

1. A limited number of new multinational retailers.
2. Better car parking
3. An enhanced catering offer incorporating an increased range of good quality bars, cafes and restaurants.

The vitality of the Town Centre is under threat amidst traffic congestion and a stagnation in new retail development to provide high quality retail floorspace which the modern retailer demands. Glengormley "shares" its catchment with a number of other good quality retail destinations so the need to upgrade, improve and create a point of difference is clear. Further promoting both the daytime and evening economies is seen as a key way of achieving this.

The Glenwell Road trading estate – it's potential as a rejuvenated retail / leisure focal point.

The Glenwell Road area already comprises **Jollyes Pet Food Superstore**, **McDonalds**, **The Movie House** and **Sportsbowl Bowling Alley**. Behind it (running to the M2) are a number of vacant sites and office / warehouses. Alongside it lies a vacant former car sales site, a Petrol Filling Station and a Kwik-fit Tyre and Exhaust centre, none of which contribute anything to the daytime retail environment or visual amenity of the town. These important frontage sites are currently being utilised for uses which are to the detriment of "place making" in Glengormley town centre.

Taking this further, it is deemed that the southerly (older) portion of the Tramways centre offers little to the town. If removed, just the Iceland and Medical Centre (important town centre anchors) would remain (important town centre anchors).

If this overall site could be assembled and comprehensively redeveloped, the following could potentially be accommodated:

1. Comprehensive redevelopment of the existing Glenwell Road parade of units to provide more modern units for existing occupiers in addition to new units to accommodate new retailers.

2. A better linkage of the Glenwell Road area with the town centre.
3. Public Realm works to enhance the amenity and help to provide a focal point for the town. Re-establishing the identity of the town centre in this area might help to re-establish the town in the minds of local residents and reaffirm a sense of place which was lost when the village square became disjointed.
4. New restaurant pods which would be attractive to families
5. Additional parking to increase the overall provision in the town.

6. Customer / Shopper Views

6.1 Introduction
PPS5 requires that customer surveys be carried out as part of a Town Centre Health Check to assist in monitoring and to assess the effectiveness of town centre improvements and in setting priorities. It suggests that interviews in the town centre and at home should be used to establish views of both user and non-users of the centre, which may establish the degree of linked trips or multi-trips.

As a secondary outcome, a customer survey also confirms the extent of the catchment / study area, with the questionnaire including details of the origin, purpose, frequency, other shopping destinations, likes and dislikes, perceptions, etc. of the main centre visited for non-food shopping.

6.2 Methodology
Consumer views were ascertained through a combination of two seperate surveys, which were conducted as follows.

6.2.1 The Household Survey
The household telephone survey allows us to determine:

- Town centre and local catchment areas for convenience goods and non-bulky and bulky comparison goods shopping;
- The levels and pattern of consumer expenditure, retention and leakage;
- Estimates of the retail turnover in Glengormley Town Centre; and
- Consumer attitudes towards the centre.

The household survey area follows the area surveyed as part of the Belfast Metropolitan Area Plan 2015 survey completed in 2003 and was agreed with the Depatrment of Social Development prior to the fieldwork. It is shown in Figure 6.1 and the sample size for each of the survey zones is outlined in Figure 6.2.

A total of XXX interviews were conducted over a period of XXX weeks, between XX February and XX March 2010.

6.3.2 Shoppers Survey
In order to ensure that the 'health check' is as comprehensive and robust as possible, street surveys of shoppers in Glengormley town centre have been undertaken. Interviews were conducted face to face, using a structured questionnaire.

Interviewing locations were selected in order to try and to ensure that shoppers would have completed their shopping prior to their interview. This approach yields data on actual shopper expenditure etc, rather than just buying intentions. The table below details the location, date and number of interviews undertaken. Overall we undertook XX shopper interviews. Interviews were undertaken between 10am-4pm each day.

6.3 Telephone Survey
XXX

6.4 Shoppers Survey
XXX
Retail ('Shopping for goods') was the main reason stated for visiting Glengormley (89%)

Main items to be bought - “food to take home” 80.9%, “Leisure Services” 12.4%. Reflects importance of Iceland?

Items actually purchased - “food to take home” 88.8%, “Clothing” 14.60%. Also 22.5% stated “leisure services”.

Main centre for non-food shopping - 1% Glengormley, 48% Abbey Centre, 23% Belfast City Centre

Why choose as main non-food centre? No clear response - reasons vary - ‘better range of large multiple stores’ 26%, ‘habit / always shopped there’ 26%, ‘good choice / variety of stores’ 24%, ‘because of a specific store’ 22%, ‘plenty of bars / cafes/ restaurants 22%, ‘good quality shops’ 21%

Average spend (on that day):
food - £29.53
non-food - £6.35
bulky goods - £1.80
catering - £3.92
other - £0.55
total - £42.15

frequency of visit to Ballyclare - 37% “once a week”, 28% “2-3 times a month”

Origin of journey - Home 90%

length of journey - average = 0.83 miles, 9.8 minutes

Mode of transport - 32% car driver, 44% car passenger, 10% bus, 13% walk.

length of visit - average = 65.7 mins, 37% “1 hour 30 mins - 2 hours, 21% “2 hours - 2 hours 30 mins”, 22% “less than 30 mins”

Normally purchase:
- food to take home - 58% this town centre, 37% this town centre an elsewhere
- clothing and footware - 89% somewhere else
- bulky goods - 97% somewhere else

Main centre for food to take home - Belfast City Centre 59.5%, Abbey Centre 26.2%, Newtownabbey town centre 11.9%, 0 for Glengormley! 0 for Northcott!!?

Main centre for clothing and footware - Belfast CC 72.2%, Abbey Centre 16.5%. 0 for Glengormley!!

Main centre for bulky goods - Belfast CC 74.5%, Abbey Centre 16.3%, 0 for Glengormley!!

Main centre for other goods - Belfast CC 66.3%, Abbey Centre 15.3%. 0 for Glengormley!!

How would you describe the shopping in this town centre? too many small shops / not enough large stores 98%

How do they rate the shops - “Too cheap / downmarket” 95%

How would you describe the layout of the town - 92% “too compact / can get congested at times”

Your opinion of Ballyclare? “Quiet” 34% “Scruffy” 25%, “Unsafe” 23%

Important shops:
Tesco 83%??!!, Iceland 45%, Financial institutions / banks / building societies 16%

Like to see:
26% “None / Don’t know / No reply”, “Boots / Superdrug” 18%, “Next / Principles /Wallis / Laura Ashley” 17%, “Supetmarket - Sainsbury / Tesco / Asda” 15%

Which other facilities most need improving?
- Wider choice / variety of shops - 75%
- Better quality stores / goods - 31%
- More / better parking facilities -12%
- More / better places to eat or drink - 10%

most important improvement?
- Wider choice / variety of shops - 39%
- Better quality stores / goods - 12%
- More / better parking facilities - 11%

Facilities not currently available that you would like to see provided? 36% - None / Don’t know / No reply, next highest “better range of shops” (17%)

Describe Sports and Leisure facilities?
65% Quite inadequate

Describe entertainment facilities?
60% Quite adequate, 37% Totally adequate

Describe catering facilities?
69% Totally adequate, 29% quite adequate

7. Retailer Views

7.1 Introduction

PPS5 suggests that retailer views, alongside the views collected from customers / shoppers will assist in monitoring the effectiveness of town centre improvements and in setting priorities.

7.2 Methodology

Professional interviewers visited a sample of XX retail shops in Glengormley town centre. The interviewers asked to speak with the shop 'manager' or 'owner' (if unavailable they called back) and explained the survey to them, arranging a date for the interviewers to return and collect the completed questionnaire. The questionnaire was accompanied by a covering letter from the Department of Social Development and Newtownabbey Borough Council.

Questionnaires were delivered during the week beginning XX February 2010 and collected during the week XX February 2010. Where a form was not properly completed, the interviewer offered to sit down and run through it with them.

Overall, we achieved positive responses from XX stores, representing a response rate of X%. We are grateful for the help given to us by consultees in encouraging traders to respond to our survey (eg. Chamber of Commerce etc.).

7.3 Retailer Survey

XXX

8. Urban Design Appraisal

8.1 Introduction

The environmental quality and physical structure of a town centre is measured via an urban design appraisal of the centre. In accordance with PPS5, this indicator assesses:

- The physical condition of the town, including street clutter, litter and graffiti; and
- The environment attributes, including the quality of shop fronts, landscaping and open spaces).

Further to this, the full urban design appraisal considers the entire built environment, including landmarks and quality buildings, the public realm, sense of arrival and place, orientation within the centre and signs of urban decay and neglect, etc. The design of the centre has also been considered in relation to crime, opportunities for surveillance, etc.

8.2 XXX

XXX

9. Summary and Conclusions

9.1 Introduction

Each of the PPS5 indicators outlined in this Town Centre Health check can be brought together to present an overall picture of the vitality and viability of Glengormley Town Centre. This in turn can then inform a 'SWOT Analysis', considering the relative strengths and weaknesses of the town centre, the opportunities to improve the overall vitality and viability of the centre and the factors that could threaten the success of improvements.

9.2 Strengths

The main strengths of Glengormley Town Centre as identified through the Town Centre Health Check include:

- Free access to public car park.
- The town centre being served by frequent bus services.
- A number of small, independent convenience retailers.
- Relatively even land use distribution.
- Developed a strong niche role in the service sector.
- Presence of a number of small, independent offices.
- Location in the midst of residential suburbs.
- Relatively high recorded footfall, comparable with other town centres of a similar size.
- The Tramway Medical Centre and Iceland are high footfall generators.
- Traditional town centre core has a high pedestrian flow, despite a clustering of vacant and derelict units.
- More peripheral areas still retain a reasonable footfall, especially on a Saturday.
- Town centre may be well used by local residents on a Saturday.
- Strategic location in close proximity to Belfast and the motorway network.
- Home to several popular restaurants and take-aways.
- Iceland is reported to trade very well in the town.
- Most of the major banks are represented in the town, supported by a large number of professional and financial services.
- Two medical centres are excellent footfall drivers and key assets to the town.
- The Movie House and the Sportsbowl are key assets as major leisure attractors to Glengormley from the wider East Antrim area.
- An already relatively vibrant evening economy.
- XXX

9.3 Weaknesses

The main weaknesses associated with Glengormley Town Centre have also been identified through the Town Centre Health Check, including:

- Congestion suffered on all approach roads.
- The four-lane Antrim Road dominates the Town Centre.
- Traffic and forecourt parking presenting a hostile environment for pedestrians. Walking is often difficult, unpleasant and unsafe.
- The town centre is only served by one pair of bus stops.
- Physical severance of the town centre by the Antrim Road.
- Footway's vary in terms of quality and width.
- Dropped kerbs are not comprehensive, imparing movement of wheelchairs and buggies, etc.
- Lack of provision for cycling.
- Low representation of convenience and comparison

retail outlets.
- High proportion of leisure services leads to a lack of vitality during the day.
- High vacancy rate, most notably fronting onto the Antrim Road in the traditional retail core.
- Almost no residential properties within the town centre, detracting from vitality.
- Pedestrian flows are lower in more peripheral areas.
- Considerable leakage to nearby competing retail centres, including the Abbey Centre, Northcott and Belfast City Centre.
- Majority of occupiers are low quality, smaller independents, which faile to generate a strong 'sense of place'.
- Shop fit-outs and frontages are ageing and in need of upgrade.
- Very low Prime Retail Rents.
- High turnover of local tenants in retail units.
- Little market interest in currently vacant units.
- Unattractive to both multinationals and indigenous retailers alike.
- Very limited range of local independent retailers.
- Lidl is physically disjointed from the town centre.
- Office development is deemed to be unviable. Mallusk will remain the principal office location in the area.
- Existing pubs and bars not amenable to families and young people.
- Parking problems currently constraining growth in the leisure and catering sectors.
- Town Centre suffers from some anti-social behaviour in the evenings.
- XXX

9.4 Opportunities

The main opportunities identified to improve Glengormley Town Centre include:

- The proposed 90 space 'Park and Ride' facility at Junction 4 of the M2 will provide an additional Express Service between Glengormley and Belfast.
- High footfall improves the viability of any future retail, commercial and leisure developments.
- Relatively low rents could offer a lower cost option than that currently offered in competing centres.
- Significant expansion in the Northern Ireland leisure and tourism markets that Glengormley could capitalise upon. Most notably, the catering offer could be expanded, including good quality cafes, restaurants, wine bare, etc.
- Potential to attract a larger Children's Indoor Play operator.
- The Glenwell Road trading estate is identified as having significant potential as a rejuvinated retail and leisure focal point.
- XXX

9.5 Threats

The main threats to the success of the Town Centre inthe future include:

- Competition provided by the Abbey Centre, the Northcott Shopping Centre and Belfast City Centre restrict the viability of the town centre as a traditional retail destination.
- The new Sandyknowes Centre is likely to 'soak up' any

latent demand from multinational retailers.
- XXX

9.6 Conclusion
XXX

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